



ECB Self Registration User Guide Version 1.0

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Date December 12, 2006

Revision History:

Date	Author	Version	Change Reference
11/10/06	Frank Southfield	0.1	Initial TOC draft.
12/08/2006	Frank Southfield	0.9	Updated document
12/15/2006	Frank Southfield	1.0	Updates from Tammy

Approval/Review History:

Date	Reviewer	Version	Signature



Date December 12, 2006



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1 eCB Self Registration for Security Architecture

1.1 **Document Purpose**

The purpose of this document is to provide assistance to users registering for a Security Architecture account to access the eCB application. This document contains an overview of the required steps to register, important data, and how accounts are approved and maintained.

1.2 **Document Overview**

This document has 5 major sections:

- 1. Destination Point Administrator (DPA) Registration
- 2. Financial Aid Administrator (FAA) Registration
- 3. DPA User Administration
- 4. User Profile Maintenance
- 5. Frequently Asked Questions

These sections are designed to guide the user through the entire registration process.



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2 **Destination Point Administrator Registration**

2.1 What is a Destination Point Administrator?

The Destination Point Administrator (DPA) is the designated administrator for an institution. An institution may have up to 2 DPAs assigned – a primary and a secondary DPA. For the purposes of registering for the eCB application, both DPAs have the same rights and privileges and can perform all actions outlined in this guide. Both DPAs must follow the same process to register.

2.2 **Registering with Participation Management**

The first step in registering as a DPA for your institution is to register with the SAIG Participation Management system as an eCB DPA. The details for this process can be found at:

http://www.fsawebenroll.ed.gov

Once this process is completed and you have been issued a TG# and PIN, your information will be transferred to the Security Architecture application to allow you to verify your information and sign up for a Security Architecture account for eCB.

2.3 Login to Security Architecture by confirming your information and creating an account

After your data is in the SAIG Participation Management (PM) system or if you are already a registered eCB DPA, you will be able to create your Security Architecture eCB account by simply matching your: First Name, Last Name, Date of Birth, and Last 4 of your SSN. This information must match exactly with the information recorded in the SAIG PM system. The screen shot below is what this page looks like.

After you have verified your information, the next step is to provide some additional information to create your account. This information includes:

- Organization Name and Address
- E-Mail address this is where we will send your user ID and any future correspondence
- Password please note the password requirements listed on the screen
- Supervisors information
- Answers to challenge questions these challenge questions are used to verify your identity if you forget your password in the future



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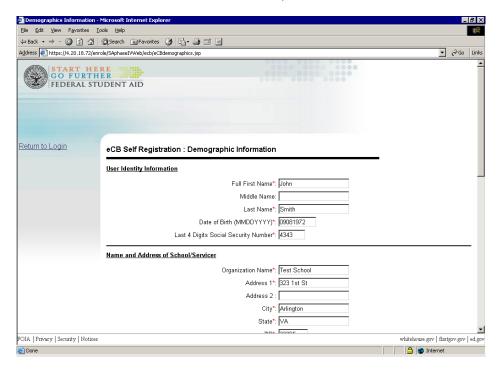


Figure 1. Entering in Demographics Information

Once you have submitted and confirmed this information, the system will display what school(s) you have access to based on the data received from PM and what your access rights are for the school(s). After you confirm this information is correct and hit submit, your account will be created and an e-mail will be sent to you containing your user name.

2.4 What happens next?

After you are registered as a DPA for your school and have your Security Architecture account created, as a DPA you will be able to review, approve/reject, and manage other users registered to access eCB for your schools OPEID. Section 4.0, **DPA Account Approval and Maintenance**, will walk you through the steps to review and maintain other users for your school.



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3 FAA Registration

3.1 What is an FAA user?

An FAA user is any non-DPA user of the eCB application. Users can either have the same rights per year or different rights for each award year. The rights available are:

- 1. Read Only
- 2. Read, Write
- 3. Read, Write, Submit
- 4. DRAP

When FAA users register, they may select to have the 'Same Rights as a DPA'. This will give the user Read, Write, Submit access for all award years. This does not give the user the ability to approve and maintain users.

3.2 Existing User Registration for an eCampusBased Security Architecture Account

Similar to DPAs, Security Architecture has loaded all existing FAA users into the database. Unlike DPAs, this data only includes users registered before October 23, 2006. Users who need eCB accounts that were not registered before that date will have to follow the full registration process outlined in Section 3.3. For users who had accounts prior to October 23, 2006, follow the steps in sections 3.2.1 - 3.2.3

3.2.1 Confirmation of PM Information

The first step in creating an account is verifying the following fields:

- First Name
- Last Name
- Date of Birth
- Last 4 of SSN

This information needs to match exactly the data contained in the SAIG PM system. Any variance in this information will not match and require that the account go through a full registration process and be approved by the institutions DPA.

3.2.2 Entering in of Demographic Information

After you have verified your information, the next step is to provide some additional information to create your account. This information includes:

- Organization Name and Address
- E-Mail address this is where we will send your user ID and any future correspondence
- Password please note the password requirements listed on the screen
- Supervisors information



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• Answers to challenge questions – these challenge questions are used to verify your identity if you forget your password in the future

Once you have submitted and confirmed this information, the system will display the school(s) you have access to based on the data received from PM and what your access rights are for the school(s). After you confirm this information is correct and click on submit, your account will be created and an e-mail will be sent with your user name.

3.2.3 Confirming School(s) Access Information

The final step in creating an account is to confirm the school(s) the account is associated with and the access rights. If this information is correct, the account should be submitted and an e-mail will be sent to the e-mail address entered in the demographics page.

3.3 New User Registration for an eCampusBased Security Architecture Account

For all new eCB users or users who registered after October 23, 2006, the full registration process is required to create an eCB account. This process contains the following steps:

- 1. Entering in demographic information
- 2. Selecting the school(s)
- 3. Selecting the access rights and years for the school(s)
- 4. Confirming the information

After the information is confirmed and submitted, the DPA(s) for the school(s) will receive an e-mail indicating that there is a request pending review in their account. Once the account is approved by at least one DPA, an e-mail will be sent to the user with the user ID. At that point, the account will be activated with the password self-selected on the demographics page for the schools that a DPA has approved.

3.3.1 Entering Demographic Information

The first step in creating an account is to enter in the required demographic information. All the fields with a '*' next to them are required. This information will be reviewed by the DPA(s) to determine whether or not to approve the account. Also included with the demographic data is a password and challenge questions. The password will be used to login to the application after the account is approved and the challenge questions are used to reset the password in the future if the password is forgotten. The screen shots below show the demographic data required.



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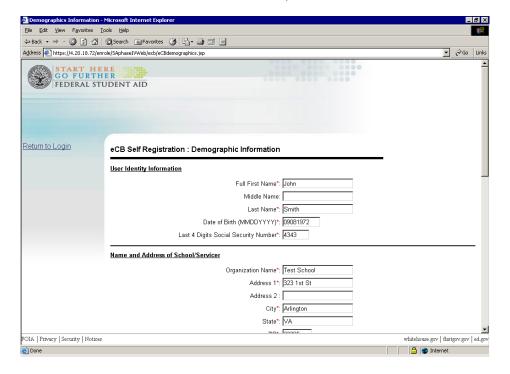


Figure 2. Entering in Demographics Information

3.3.2 Searching for School(s)

The next step in registration is to choose the school or schools you need access to. The system provides the ability to enter in an exact OPEID to be matched or to search either by a partial OPEID or school name. There is no limit to the number of schools that a user can register for. The screen shots below illustrate the process to search for schools.

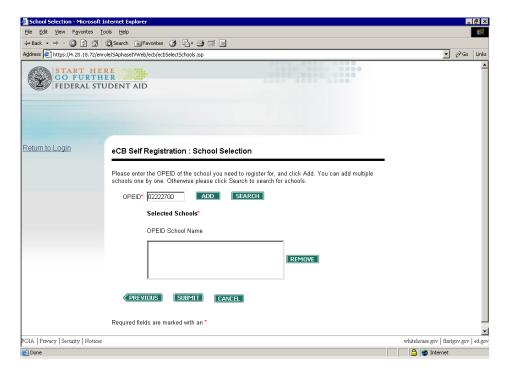


Figure 3. Search for Schools



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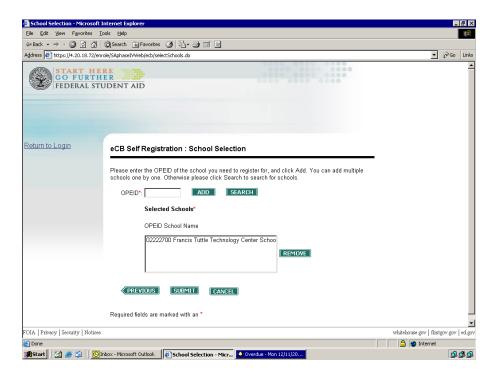


Figure 4. Adding a School to the List

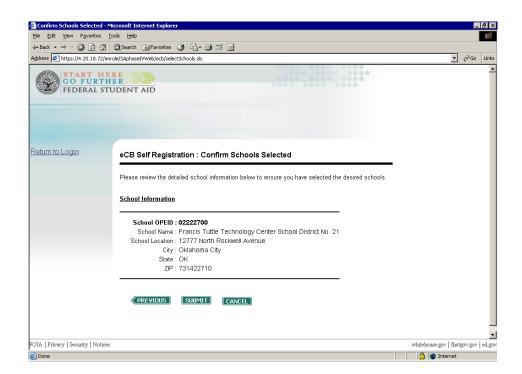


Figure 5. Confirming School Details

NOTE: The schools DPA must be registered for an eCB Security Architecture account before new users may register for eCB. Please contact the schools DPA if you are unable to register for an account because of this.



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3.3.3 **Selecting Access Rights and Confirming Information**

After selecting the school(s) to you need to access, the next step is to select the role and access rights by award year and school. If more than one school was selected, the option is available to select the same access rights and years for all schools to streamline the registration process. There is also the ability to register for the same rights as a DPA. This gives the user Read, Write, and Submit access to all five years. The option is available to select different access rights for each school if that is required. The access rights available are:

- Read only
- Read, Write
- Read, Write, Submit
- **DRAP** Only

For each year selected, access rights must be selected. Also, a user must be registered for the most current award year to have access to the application. The screen shots below illustrate the options available to select Access Rights.

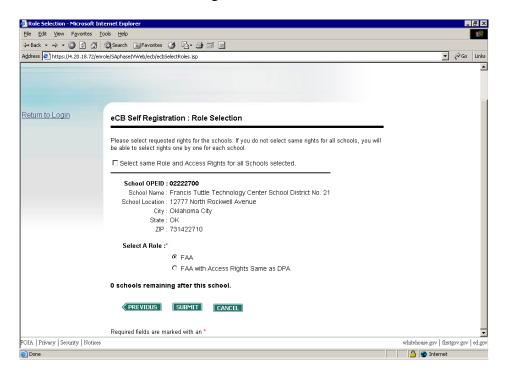


Figure 6. Select Roles



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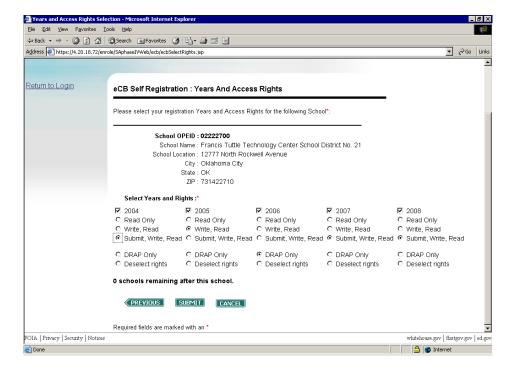


Figure 7. Select Years and Access Rights

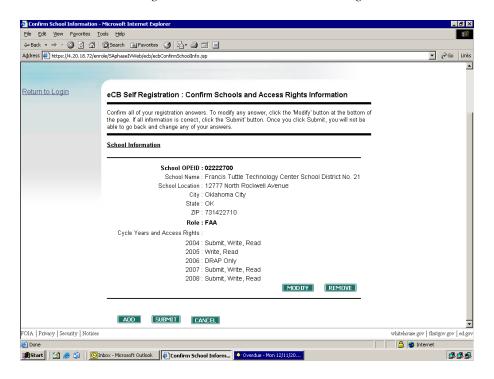


Figure 8. Confirm Years and Access Rights

After selecting the years and access rights, the final step to register is to confirm the demographic information entered in the first step and the schools and access rights selected.

3.4 What happens next?



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Once the registration is complete, the DPA(s) for the school(s) selected will receive an e-mail indicating they have an account ready to review and approve. The Supervisor listed in the Demographics section will also receive an e-mail. The user will receive an e-mail each time a request is approved or rejected. If there are any questions about the status of the request, the DPA should be contacted.



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4 DPA Account Approval and Maintenance

This section provides a review of the Administrative portion of the application for the DPAs. There are two high level tasks that DPAs can perform:

- 1. Review access requests
- 2. Maintain existing users access

The following sections outline the steps to perform these tasks.

4.1 Account Review

4.1.1 Notification of an Account Request

The first step in the account review process is an e-mail sent to the DPAs registered for each school in the request. If a school has more than one DPA registered(2 is the max allowed), each DPA will receive an e-mail notifying them of the request. The request could either be for a modification to an existing users account or for a new user. Both types of requests will generate an e-mail to the DPA(s).

4.1.2 Login to Administrative Application

To get to the DPA Admin Application, use the 'DPA Administration' link on the left hand side of the login page. Before January 22, 2007, the URL for the eCB application behind Security Architecture is: http://www.pilot.cbfisap.ed.gov. After January 22, 2007, the main eCB URL will direct the user to the Security Architecture login page: http://www.cbfisap.ed.gov.

After selecting the 'DPA Administration' link, the DPA will be directed to a login page to login with the user ID and password.

4.1.3 Review of User Request

After logging in, the first page displayed is the pending requests page. This will list all requests pending review and approval whether they are new users or users who have requested a change to their access(ex. a user who used to have Read access who wants Submit access). To review the details of the request, click on the link for that request. The screen shot below illustrates the Pending Requests Page.



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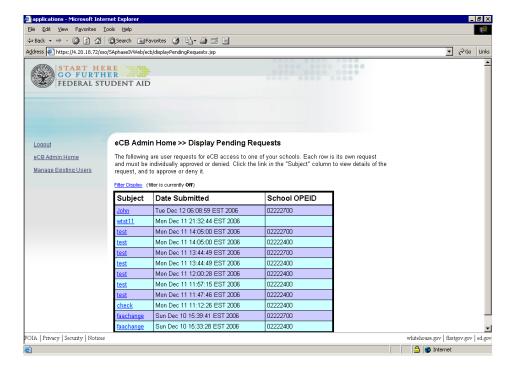


Figure 9. List of Pending Account Requests

4.1.4 Approve / Reject Request

After selecting the request to review, the details of the request are presented. This includes all the users demographic information including e-mail address, phone number, and the supervisor they listed. The details of the request also include the access rights by year that the user has requested. At this point, the DPA only has the ability to Approve or Reject the request. If the request is approved, the DPA can then modify the access rights using the instructions in the following section. The screen shots below illustrates the request details review.



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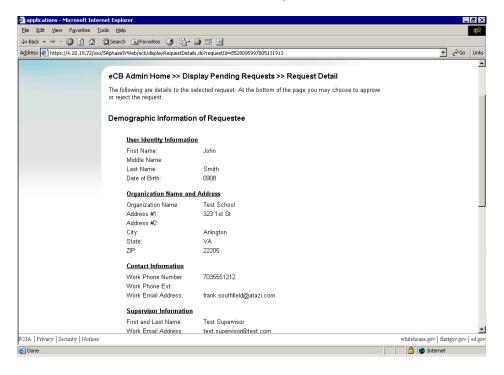


Figure 10. Details of Pending Request

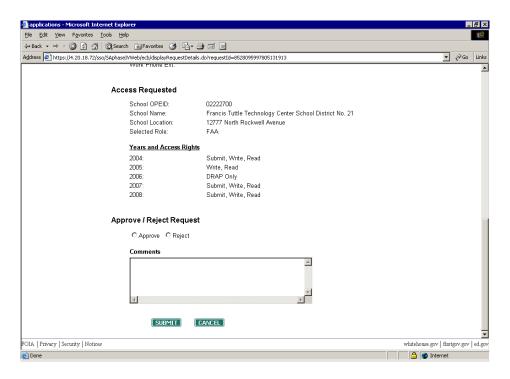


Figure 11. Details of Pending Request Continued

After the request is approved or rejected, the DPA is taken back to the list of pending requests minus the one just approved or rejected.



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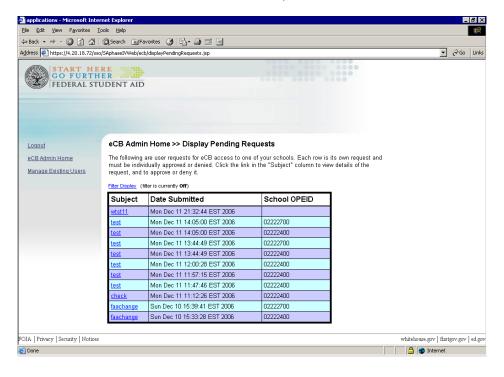


Figure 12. Pending Requests Post Approval

4.2 Account Maintenance

One of the most critical aspects of being a DPA is to maintain the accounts of users access. This includes both modifying access when users responsibilities change and removing their access when users no longer work at the school or in a position requiring access to the application. The following sections demonstrate the process of reviewing the users accounts, modifying their access, and removing the access if required.

4.2.1 Reviewing User Accounts with Access to your School(s)

After logging in to the DPA Administration application as outlined in Section 4.1.2, there is a link on the left hand side of the page to 'Manage Existing Users'. After clicking on this link, all the users with access to your schools eCB data will be displayed. To review the details of their account use the link associated with their data. The screen shot below illustrates this list.



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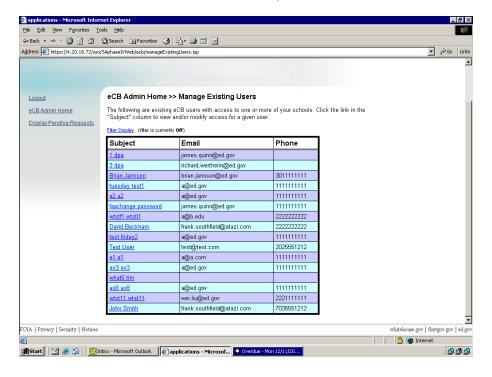


Figure 13. List of Existing Users

4.2.2 Modifying or Removing Access

After reviewing the details for the access a users account has, the DPA has the ability to modify the access if necessary. For example, a user may have changed roles and need to have their access changed from 'Read, Write' to 'Read, Write, Submit'. There are two ways this can be accomplished. First, the user can request the change by updating their profile. If the user requests the change, this will become a 'Pending Request' for the DPA review follow the steps outlined in Section 4.1. If the change is made using the DPA Administration Application, the change takes effect immediately for the user. To modify access, click the 'Modify' link at the bottom of the page below.



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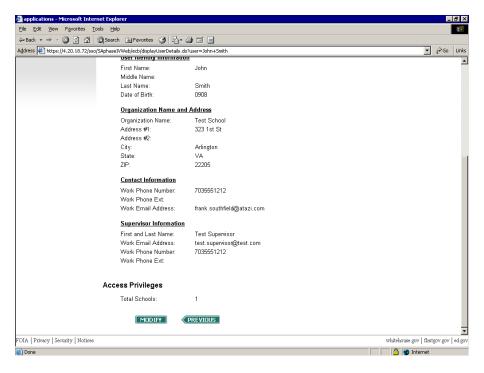


Figure 14. Details of Existing Users

The next page is the 'View / Modify Access Privileges' page. There are two choices on this page:

- 1. Delete / Remove access to a School
- 2. Modify the users access rights for a school.

The access rights for the user are displayed on the page as well as the ability to make any changes. If there are any changes made, click the submit button at the bottom of the page to save the changes and have them take effect. The screen shot below displays the options available on this page.



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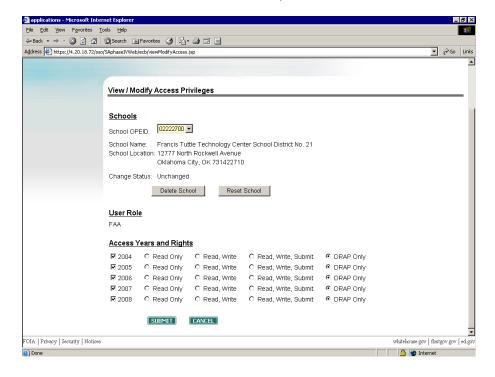


Figure 15. View and Modify Access Privileges and Schools

5 User Profile Maintenance

After a user has an account approved by at least one school, they will have the ability to manage their profile and request additional access if needed. There are three high level tasks a user may perform:

- 1. Update demographic information
- 2. Requesting a change to access rights for a given school
- 3. Requesting access to an additional school

Demographic changes are saved immediately to the profile while changes in access rights or access to additional schools must be approved by the individual schools DPAs before taking effect.

5.1 Updating Demographic Information

To update a users profile, the user must click on the 'Update Profile' link on the login page and login. After logging in, click on the link to update 'Demographic Information', see the screen shot below.



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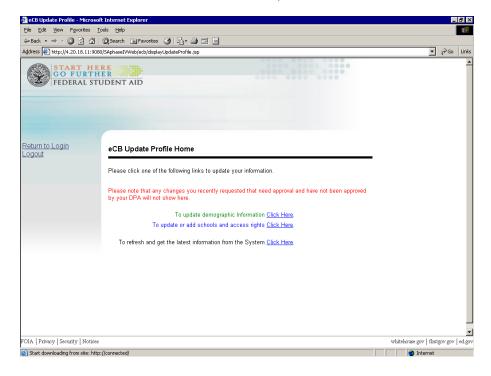


Figure 16. Update Profile Home Page

After reviewing what the system has for demographic information, click on the 'Modify' button at the bottom of the page to change any of the data that may be modified. User Identity Information such as first name, last name, date of birth, and last 4 of SSN cannot be modified. The other contact information can be changed and saved to the database. These changes will take effect immediately. See the screen shot below for an example of this page.

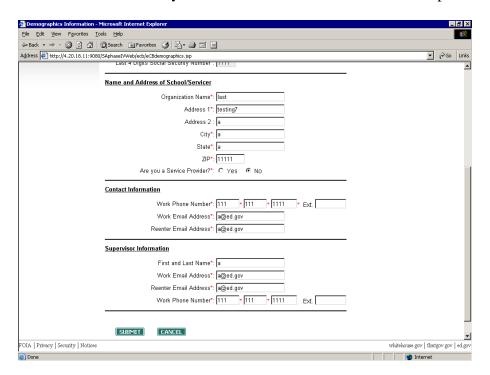


Figure 17. Edit Demographics Page

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5.2 Requesting Changes to Access

FAA users may also request a change in their access to one or more of the current schools they have in their profile or access to additional schools. Please note, any changes to the access rights to existing schools or requests to access additional schools data must be approved by the schools DPA prior to taking effect. The current access rights will be maintained until the DPA has approved the request. The screen shots below illustrate the process for requesting a change in access rights.

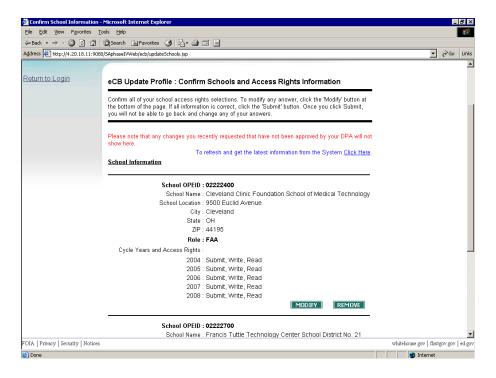
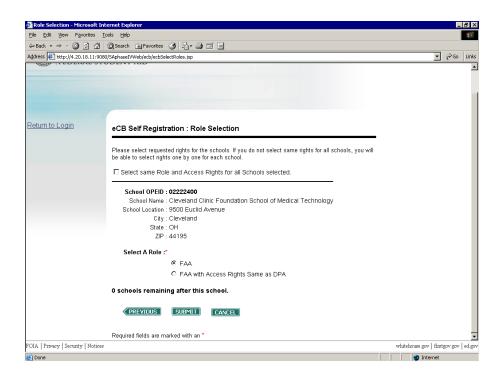


Figure 18. View School Details for Registered Schools

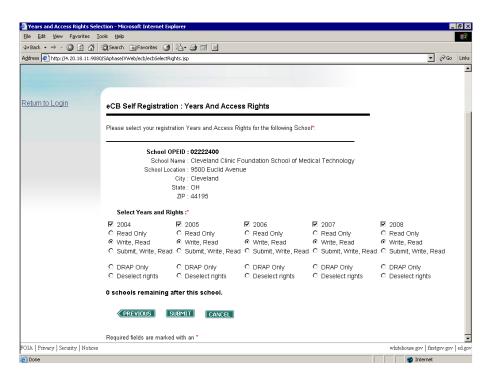




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Figure 19. Modify / Select Roles



Modify / Select Access Rights Figure 20. File Edit View Favorites Iools Help

→ Back
→ → ② ② ② ③ ② ② ③ □ Address Addres ▼ @Go Links City: Oklahoma City State : OK ZIP : 731422710 Role : FAA Cycle Years and Access Rights: 2004 : Submit, Write, Read 2005 : Submit, Write, Read 2006 : Submit, Write, Read 2007 : Submit, Write, Read 2008 : Submit, Write, Read MODIFY School OPEID: 02222400 School Name: Cleveland Clinic Foundation School of Medical Technology
School Location: 9500 Euclid Avenue City : Cleveland State : OH ZIP: 44195 Role : FAA Cycle Years and Access Rights : 2004 : Write, Read 2005 : Write, Read 2006: Write, Read 2007 : Write, Read 2008: Write, Read MODIFY REMOVE ADD SAVE CANCEL FOIA | Privacy | Security | Notices whitehouse.gov | firstgov.gov | ed.go Internet

Figure 21. Confirm Modify Access Rights



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Frequently Asked Questions

General Questions

What is Security Architecture?

Security Architecture is an implementation of IBMs Tivoli Identity Management (TIM) and Tivoli Access Management (TAM) products to provide a framework for manage accounts across Federal Student Aid web applications. eCampus Based is the first major application using Security Architecture that is used by schools.

Security Architecture will provide users with the ability to login with a user id and password rather than having to use their full social security number and PIN. This same user id and password will be used to access other partner facing websites in the future.

When will all this be happening?

For current eCB users, they can register for a Security Architecture account now following the links at: http://www.pilot.cbfisap.ed.gov/. If they are not currently an eCB user, they can register after 12/18/2006 at the URL above.

As of January 22, 2006, all access to the eCB application will be secured by Security Architecture. All existing users will have to verify their account information and create a password. New users will have to register for an account and be approved by their schools Destination Point Administrator (DPA). At this time, users will go to: http://www.cbfisap.ed.gov.

What other applications will be / have been integrated with Security Architecture?

Federal Student Aid initially concentrated on configuring TIM / TAM with internal web applications to minimize the impact and risk for schools and other trading partners. The Experimental Sites application has been integrated with Security Architecture and eCampusBased is the second school facing application to be integrated.

The timeframe for legacy applications has not been set at this point, but re-engineered applications are being integrated with Security Architecture including Integrated Partner Managerment (IPM).

What is changing about the eCampusBased application?

Only the way the user logs into the application changes. The application after login is exactly the same.

Registration Questions

How do I register if I currently have a PIN to access eCB?



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If they currently have access to eCB, they should just need to match your First Name, Last Name, Date of Birth, and Last 4 of their SSN to match the account information from the Participation Management (PM) system. This information needs to match their account in PM exactly to create their account without requiring approval.

After their account information is matched, you will be asked to provide additional demographic details, select a password, and answer challenge questions. Once the registration is complete, they will receive an e-mail with the user id.

I'm a new DPA at my school, how do I register for eCB?

All DPAs must first register with PM following the existing DPA registration process. Once the PM registration process is complete, the DPAs data will be loaded into SA and the DPA will be able to register like in section 3.1.

I'm a new FAA user to eCB, how do I register?

New users will have to complete the following steps to register:

- 1. Complete the demographic information required from all users
- 2. Search for the school(s) they are signing up for
- 3. Select their access rights
- 4. Submit the application for an account

The school(s) DPAs will receive an e-mail asking them to review their account request. Once this approval has happened, they will receive an e-mail with their user id.

What if my schools DPA has not registered?

All new account requests must be approved before access can be granted to eCB. If their school's DPA has not registered with Security Architecture, there is noone authorized to approve account requests so and they must wait until the DPA has registered to apply for an account.

I applied for access to multiple schools, but only seem to have access to a portion of the schools. What happened?

Each school's DPA must approve a request. The user will receive their user ID when the first school approves the request, but will not gain access to other schools data until each school's DPA also approve the request.

What do I do if I do not hear back about my account quickly?

The best way to address this is to contact the schools DPA to ask if they have reviewed the request. If they have not, ask them to login to the eCB Administrative Application and review your request. If they have reviewed and approved the request, contact the help desk and report this issue.



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I created my account based on the data in PM, but my access rights / schools do not appear to be correct. What do I do?

If this happens, they will need to contact the PM help desk to have their account researched and determine what schools / rights they had within the PM system. If they are an FAA user, they can also use the 'Edit Profile' link on the login page to register for additional schools. Please note, these requests will have to be approved by the schools DPA before they take effect.

Security Architecture Functions

What do I do if I forget my password?

On the login page, there is a link on the left hand side of the page, 'Forgot Password', which can be used to reset your password. The user will be asked one or more of their challenge questions and if they provide the correct response they will be able to reset their password.

What if I do not remember the answers I provided to the challenge questions?

If the user does not know or does not answer their challenge questions, the only method we have of confirming the identity of the user is to have a DPA e-mail the eCB support mailbox with the request to reset a user's password. The e-mail must come from the registered DPA's e-mail account for this to be considered a valid request. The user will then be sent a temporary password to the e-mail address registered for that account. This password must be changed the first time the user logs in. The support mailbox is: CBFOB@ed.gov

How do I change my password?

The links on the left hand side can be used to change their password.

How often will I have to change my password?

Passwords expire every 90 days. The user will be prompted to change their password when the password is expired before proceeding to the application.

How do I update my profile?

There is a link to 'Edit Profile' on the left side of the login page. This will let you:

- 1. Update the address, e-mail address, phone number, and supervisors information
- 2. Request access to additional schools
- 3. Request a modification to the access for the existing school(s) the user is registered for.
 - For example, request that your account be given Read, Write access when you currently have Read.



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All requests affecting access to school data require DPA approval. This means that if the user wants to add additional schools or update their access rights to a school they already have access to; the DPA for the school will have to approve it before it takes effect.